



# Document Management Procedure

## *OETI-PMP-12*

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Environmental Protection Agency  
Office of Enterprise Technology and Innovation (OETI)

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## Document Change History

Version	Date	Author	Description of Changes
1.0	February 2, 2007	BAH/EPA	Initial Document
1.1	February 4, 2008	Jacob Simmons	(1) Appendix E – revised file structure to be consistent with structure implemented in the Lotus Notes document repository. (2) Appendix F - converted the Document Submission Form into Excel format. (3) Updated the procedure to be consistent with OCFO's standard operating procedure for developing new or modifying existing policies and procedures.

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## 1. Introduction

This document defines the process by which staff within Environmental Protection Agency (EPA)'s Office of Enterprise Technology and Innovation (OETI) performs document management.

### 1.1 Purpose

This document defines the methodology, process flow, and relevant standards by which OETI project staff performs document management activities and identifies participants and their responsibilities.

### 1.2 Background

A document is defined as "information, stored on paper, as a scanned image, or electronically, that may be subject to revision".<sup>1</sup> Document Management refers to the process used to track, store, and control documents.<sup>2</sup> A document management system is the software that manages documents for electronic publishing or storage and commonly provides the user the ability to check in, check out, store, and retrieve electronic documents.<sup>3</sup> The need for document management arises for a project when there are multiple document versions, multiple team members, and multiple team objectives, requiring the maintenance of an organized, easy-to-use library of files.

Document management is a subset of the overarching content management processes that are in place at EPA; however, the specific policies to govern the document management practices have not yet been authored or adopted. The Office of Environmental Information (OEI) is currently leading an effort to implement an enterprise-wide electronic content management system referred to as the Enterprise Content Management System (ECMS). However, on a smaller scale, each office has immediate needs to store deliverables, Office of Management and Budget (OMB) and EPA official documentation, meeting minutes, and other project-related documentation. This procedure addresses the immediate need for document management for OETI projects with the understanding that the EPA ECMS is still under development.

NOTE: This procedure does not address records management. A document management system is different from a records management system in that a records management system generally classifies documents as certain types of records, applies records retention schedules to the documents, and manages the disposal of documents. Some documents that will reside in this repository may be classified as records. For more information on records and how to deal with records in the repository, refer to the EPA Records Program.

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<sup>1</sup> Alliance Group, [www.alliancegroup.co.uk/Record-Documents-Content-Management.htm](http://www.alliancegroup.co.uk/Record-Documents-Content-Management.htm)

<sup>2</sup> Association for Information and Image Management (AIIM), [www.aiim.org](http://www.aiim.org)

<sup>3</sup> PC Magazine, [http://www.pcmag.com/encyclopedia\\_term/0..t=document+management+system&i=41648.00.asp](http://www.pcmag.com/encyclopedia_term/0..t=document+management+system&i=41648.00.asp)

## 2. Approach

This section explains the approach used to develop the document management procedure. It details the assumptions, scalability, and industry standards and best practices and EPA current practices consulted in creating this procedure.

### 2.1 Assumptions

The document management procedure assumes the following:

- A Document Coordinator will be appointed by the Project Manager who has familiarity with document management practices. Document management may or may not be the Document Coordinator's only responsibility, depending on the size, scope, and complexity of the project.
- This procedure is dependent on the use of an automated document management repository. It assumes that, at a minimum, the Document Coordinator is effectively trained in the use of the tool.
- This procedure addresses storage of eligible documents in an electronic repository and storage of certain hard copy documents in paper form. Specifically, signed, original hard copy documents required by EPA policy to be maintained in paper form are included in this procedure. The required signature documents and other paper documents that meet the eligibility requirements for the electronic repository are scanned and made electronic.
- This procedure addresses draft and final documents created as part of specific mission activities.
- This procedure will be used by both EPA staff and contractors. See Appendix D for guidelines when contractor support is used.
- This procedure does not address specifics as to how EPA should store and manage records associated with other project documents such as personnel, human resources, and other EPA administrative records.<sup>4</sup>

### 2.2 Scope

The document management procedure steps produce a controlled document repository. This procedure applies to all projects regardless of the size, cost, or type of project (system or non-system); however, the complexity of managing this repository increases significantly as more projects are added and as more users are given access to add documents to the repository. At a minimum, project artifacts and contract deliverables should be named and stored in accordance with standard document naming and storage requirements defined for OETI in this procedure.

### 2.3 Standards

The OETI vision includes the employment of best practices from both industry and the EPA. This procedure incorporates the following best practices and existing regulations and policies:

- **EPA regulations and standards**
  - EPA Directive 2100.5, System Life Cycle Management Policy. Available at <http://intranet.epa.gov/oei/imitpolicy/qic/ciopolicy/2100.5.pdf>

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<sup>4</sup> See Section 2.3 for references to EPA records.

- System Life Cycle Management (SLCM) Procedure. Available at:  
<http://www.epa.gov/irmpoli8/ciopolicy/SLCMProcedures-2111.5-p-1.pdf>
- EPA Web Content Management Plan. 2005. Available at:  
<http://www.epa.gov/webgovernance/content/webcm-plan.htm>
- EPA Records Program. Available at <http://www.epa.gov/records/index.htm>
- Electronic Records and Document Management Memorandum. Issued 15 Aug. 2003  
Available at: <http://www.epa.gov/records/policy/erdms-memo.htm>
- **Federal regulations, industry standards and best practices**
  - International Standards Organization (ISO) 9000, 9001, 14000 Document Filing and Retrieval. Available at: <http://www.iso.org/iso/en/ISOOnline.frontpage>

### 3. Roles and Responsibilities

Table 3.1 describes the roles and responsibilities for OETI staff involved in document management. This table lists functions or tasks that each project role performs. While each role is assigned to an individual staff member, an individual may perform multiple roles for a project.

**Table 3.1. Document Management Roles and Responsibilities**

Role Definition	Responsibilities
Project Manager	<ul style="list-style-type: none"> <li>Assigns a Document Coordinator</li> <li>Assigns a Document Filing Specialist</li> <li>Approves initial and subsequent changes to the storage eligibility criteria, file structure, metadata used to index documents and repository security</li> </ul>
Document Coordinator	<ul style="list-style-type: none"> <li>Establishes the document repository</li> <li>Reviews submitted documents to ensure they meet storage eligibility requirements</li> <li>Adds documents to the repository</li> <li>Updates Document Submission Form</li> <li>Notifies submitter when more information is needed or when documents are successfully placed in the document repository</li> <li>Monitors the repository and ensures all data entered is filed correctly and accurately</li> <li>Regularly reviews the current structure to determine if the repository is complete or should be modified to meet the projects needs</li> <li>Documents and implements new document management requirements</li> </ul>
Document Filing Specialist	<ul style="list-style-type: none"> <li>Sets up filing cabinet for storing required signed documents based on the file structure in Appendix E</li> <li>Scans hard copy documents into electronic form</li> <li>Files required hard copy documents in a filing cabinet</li> <li>Maintains filing cabinet</li> </ul>
Submitter	<ul style="list-style-type: none"> <li>Submits documents for storage in the repository</li> <li>Recommends the document folder/subfolders and metadata under which the document should be stored and referenced</li> </ul>

## 4. Procedure

This section presents the process flow for document management and describes each step of the process in detail.

### 4.1 Process Flow Diagram

Figure 4-1 depicts the process for performing document management.

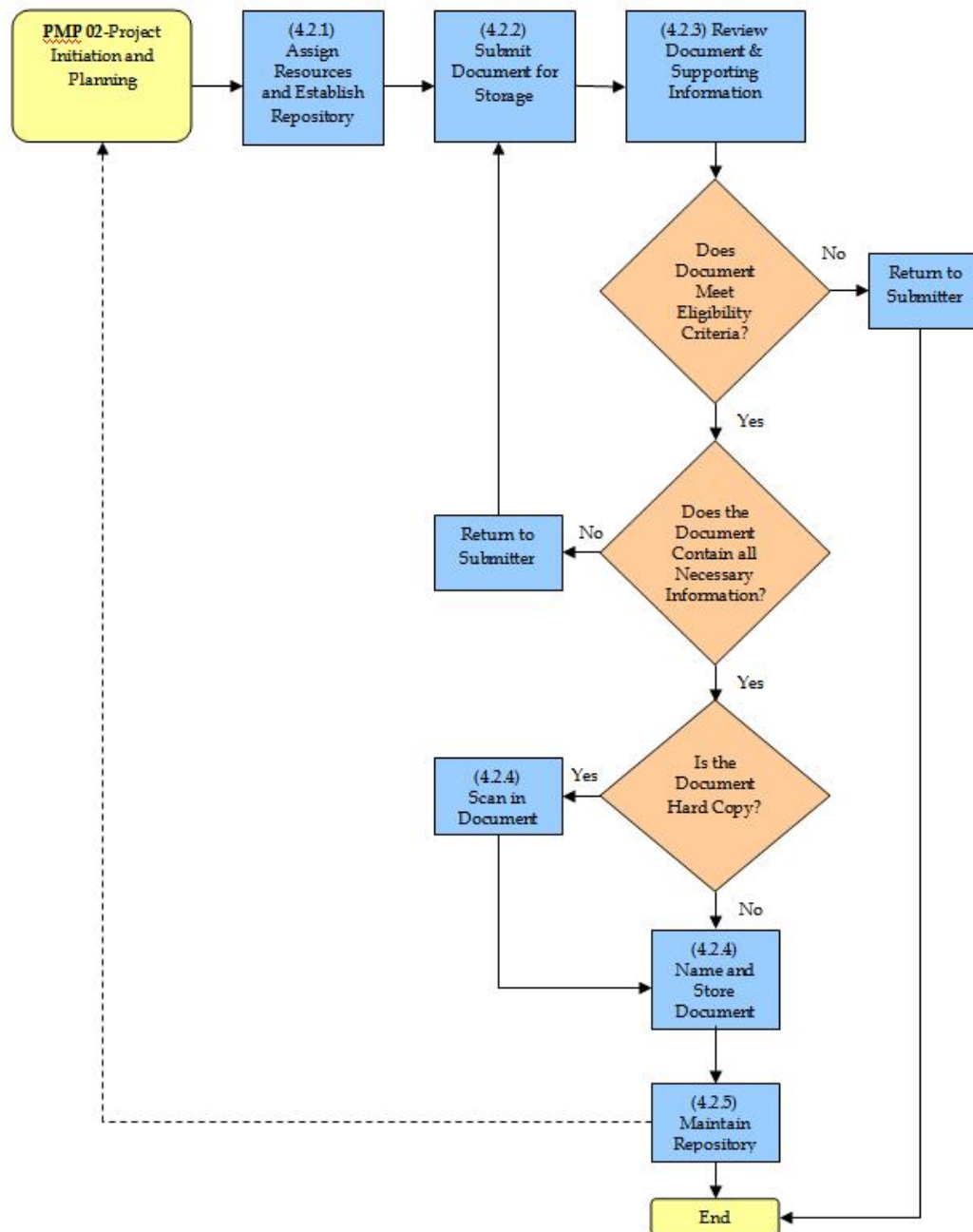


Figure 4-1. Document Management Process Flow



## 4.2 Steps

The following sections describe the steps of the document management process shown in Figure 4-1 and the roles involved with its execution.

### 4.2.1 Assign Resources and Establish Repository

The Project Manager assigns a Document Coordinator and a Document Filing Specialist. The Document Coordinator creates the electronic repository and defines the folder security based on the project structure, access needs, and expected deliverables. The Document Filing Specialist uses this file structure, to the extent practicable, creating folders in a filing cabinet for required hard copy documents. Appendix E provides guidance and a sample file structure. The Project Manager approves the file structure and security access for the project as well as any changes. Once the file structure has been established, the Document Coordinator is responsible for uploading to and maintaining the electronic repository. The Document Filing Specialist is responsible for filing and maintaining signed hard copy documents. EPA policy defines which documents require hard copy signature.

### 4.2.2 Submit Document for Storage

When a document is ready for submission, the Submitter references the eligibility criteria below and uses the Document Submission Form found in Appendix F to determine if the document is eligible for storage in the electronic repository or required to be filed in hard copy.

#### Document Eligibility:

- The electronic repository should contain items that document significant project activities, inputs, or outputs but should not be used for every piece of project documentation.
- Eligible documents include specific contract deliverables, draft and final versions, including comments. Work-in-progress documents are not eligible. Please see *PMP-10 Procurement Management Procedure* for Contracting Officer's Representative (COR) document storage requirements.
- For any Information Technology (IT) project, at a minimum, the documentation generated from the Systems Life Cycle Management Policy 2100.5 should be included in the repository.
- For documents that require a signature (e.g., Decision Memos), the original signed document must be maintained and accessible.

The Document Submission Form not only helps determine if a document is eligible but also helps the Document Coordinator categorize it in the electronic repository by associating relevant metadata with the document. Metadata helps provide additional information on the document and assists project team members in retrieving the document in the future. The more complete the metadata, the easier it will be for the document to be located.

The Submitter provides the electronic (e.g., word processed document, spreadsheet, chart, HTML page, or any other electronic file) or hard copy document for storage along with the completed electronic Document Submission Form to the Document Coordinator for review. If the document is in hard copy, it will need to be scanned to be included in the repository once its eligibility has been confirmed.

### 4.2.3 Review Document and Supporting Information

Once received, the Document Coordinator reviews the submitted document and supporting information and first determines whether the submitted document is eligible for storage (based on the eligibility criteria and the Document Submission Form). If the document does not meet the eligibility requirements, the Document Coordinator returns the document to the Submitter with an appropriate explanation.

If the eligibility criteria are met, the Document Coordinator reviews the storage and metadata information provided by the Submitter. The Document Coordinator determines if all the necessary information has been provided. If so, the Document Coordinator is ready to store the document. See Section 4.2.4 below for information on naming and placement of the document in the repository.

If the necessary storage information is missing or unclear in the original submission, the Document Coordinator returns the package to the Submitter with a note outlining deficiencies or clarifications requested.

For deficient submissions, once the Submitter completes the necessary information, he or she resubmits the package to the Document Coordinator. The Document Coordinator then reviews the corrected package. If the corrected package meets the information requirements, then the document can be stored.

### 4.2.4 Name and Store Document

If an eligible document is provided in hard copy, the Document Coordinator gives the document to the Document Filing Specialist to scan using available tools to make an electronic copy. Once the electronic copy is received by the Document Coordinator from the Document Filing Specialist, he/she assigns every file a unique identifier, consistent with the options available in the automated repository. The Document Coordinator is responsible for assigning ECMS codes to documents when uploading into the repository. OETI project documents will be assigned one of the following three predetermined ECMS categories: 304-102-735a--Capital Planning/IT Capital Investment Records/Record Copy, 401-127a--Administrative Management/General Correspondence Files/Record Copy, and 404-104-128a--IT Security/Security of Systems and Data/System Security Plans and Disaster Recovery Plans.

The following structure describes the elements to be included in the unique identifier. These elements indicate the task order/project name under which the document was produced, provide an abbreviated deliverable name, and include the version type, number and date of the document. *Draft* documents are assigned version numbers less than 1.0, while *Final* documents are assigned version numbers greater than or equal to 1.0. This type of information-rich identifier allows end users to browse the folders and have some idea of what each file contains without opening it.

Each file name consists of four parts.

- Project Name – Short name for the project (e.g., ADW as a short name for Administrative Data Warehouse)
- Document Title –Title for the document (e.g., Contract X Data Strategy Project Plan); may be abbreviated
- Version Type and Number– Draft or Final and Version number (e.g., Final\_v1.0)
- Date – Approval date in YYYYMMDD format (e.g.,2007Jan09)

The following provides an example of a properly named file:

**ADW\_X Data Strategy Project Plan\_Final\_v1.0\_2007Jan09**

The Document Coordinator updates the Document Submission Form with the document's electronic file name and date uploaded then stores the document and Document Submission Form in the designated folders in the electronic document repository, in accordance with the file structure adopted for the project. If the document contents must be maintained in hard copy as well, the hard copy document is filed in the filing cabinet by the Document Filing Specialist. The document name along with the data in the Document Submission Form (Appendix F) will assist users in locating the document in the repository.

**4.2.5 Maintain Repository**

To maintain the folder structure for the project, the Document Coordinator reviews submitted documents against the existing folder structure. When new document types that do not readily fit into the existing structure are identified, the Document Coordinator should contact the Project Manager (or his/her designee) and determine if a new folder/subfolder should be created. If agreed upon, the new folder/subfolder is created by the Document Coordinator and a new folder is created in the filing cabinet by the Document Filing Specialist, if applicable. The Document Coordinator also collects suggestions or additional potential metadata used to structure the file structure or index the documents from document Submitters when they submit their documents for storage.

The Document Coordinator periodically updates the folder structure and metadata to facilitate browsing of the files by end users. The latest version of the Document Submission Form should be stored in the Document Submission Form folder in the repository and made available to all users.

Additional maintenance could be required depending on the specific document management tool used. The Document Coordinator should consult the administrative and procedure manuals for the tool, as necessary.

## 5. Considerations

The following provides a list of general best practices that should be considered when performing document management:

- Contractors should be provided with this procedure and should be required to provide deliverables in accordance with the procedure.
- Any updates received from the OEI ECMS team about recommended metadata or folder structure should be taken into account as soon as available because the data migration can be made easier when OETI migrates to the agency-wide system.
- Hard copy documents are still a valuable resource to the project and should continue to be stored in accordance with EPA records policy.
- Capture “Lessons Learned” information throughout the storage process.
- Continue to review and update the folder structure and metadata as necessary and distribute changes to all project staff, including contractors.

## Appendix A Acronyms

Abbreviation	Description
ADW	Administrative Data Warehouse
COR	Contracting Officer's Representative
CPIC	Capital Planning and Investment Control
ECMS	Enterprise Content Management System
EPA	Environmental Protection Agency
EV	Earned Value
GAO	Government Accountability Office
ISO	International Standards Organization
IT	Information Technology
OEI	Office of Environmental Information
OETI	Office of Enterprise Technology and Innovation
OMB	Office of Management and Budget
PMP	Project Management Procedure
SLCM	System Life Cycle Management
SOW	Statement of Work

## Appendix B Checklist for Document Management

The following provides a checklist for the key activities associated with each step of this document management procedure.

Activities	Responsible Parties
<b>4.2.1 Assign Resources and Establish Repository</b>	
<input type="checkbox"/> Document Coordinator is assigned <input type="checkbox"/> Document Filing Specialist is assigned <input type="checkbox"/> Folder structure and security are approved	Project Manager
<input type="checkbox"/> Folder structure is created <input type="checkbox"/> Folder security is defined	Document Coordinator
<input type="checkbox"/> Filing cabinet is set up to maintain required hard copy documents	Document Filing Specialist
<b>4.2.2 Submit Document for Storage</b>	
<input type="checkbox"/> Document Submission Form is completed and submitted to Document Coordinator <input type="checkbox"/> Electronic or hard copy documents are transmitted, along with comments collected or addressed in its support, to the Document Coordinator	Submitter
<b>4.2.3 Review Document and Supporting Information</b>	
<input type="checkbox"/> Document is compared to completed Document Submission Form to determine whether it qualifies for storage <input type="checkbox"/> Notification of document's ineligibility for storage is sent to Submitter, if necessary <input type="checkbox"/> Storage requirement information is reviewed and found complete <input type="checkbox"/> Any additional information necessary is obtained from Submitter	Document Coordinator
<b>4.2.4 Name and Store Document</b>	
<input type="checkbox"/> Appropriate naming conventions are applied <input type="checkbox"/> Document Submission Form is updated <input type="checkbox"/> Document is loaded into the electronic document repository <input type="checkbox"/> Email indicating completion of process and location of document in the appropriate repository or repositories is sent to Submitter	Document Coordinator
<input type="checkbox"/> Eligible documents provided in hard copy are scanned and provided in an electronic format <input type="checkbox"/> Signed hard copy documents are filed in filing cabinet with Document Submission Form	Document Filing Specialist
<b>4.2.5 Maintain Repository</b>	
<input type="checkbox"/> Existing folder structure and metadata are reviewed against newly submitted documents and any necessary changes are made <input type="checkbox"/> Basic maintenance for the automated document management tool is performed	Document Coordinator
<input type="checkbox"/> Changes are made to the filing cabinet, as necessary	Document Filing Specialist
<input type="checkbox"/> Updates/changes to criteria, folder structure, metadata or security are approved	Project Manager

## Appendix C Additional Resources

The following provides a list of key resources and references associated with the document management procedure that can be used to obtain additional background information, describe concepts and methodologies and assist in completion of the activities. Sample templates and plans may not be directly applicable but can provide additional information helpful for applying this procedure.

	Form/ Guidance	Source	Website
1.	Project Management Framework – Project Archive	State of Washington	<a href="http://isb.wa.gov/tools/pmframework/projectclosure/archive.aspx">http://isb.wa.gov/tools/pmframework/projectclosure/archive.aspx</a>
2.	Electronic Records Management Guidelines	Minnesota Historical Society	<a href="http://www.mnhs.org/preserve/records/electronic_records/eredms.html">http://www.mnhs.org/preserve/records/electronic_records/eredms.html</a>
3.	Information Technology Services - Project Document Storage and Archive Guidelines	Stanford University	<a href="http://www.stanford.edu/dept/its/projects/PMO/files/archive_guidelines.html">http://www.stanford.edu/dept/its/projects/PMO/files/archive_guidelines.html</a>
4.	Electronic Document Imaging Systems Guidelines	Georgia Secretary of State	<a href="http://www.sos.state.ga.us/archives/who_are_we/rims/publications/electronic_document_imaging_systems_guidelines/default.htm">http://www.sos.state.ga.us/archives/who_are_we/rims/publications/electronic_document_imaging_systems_guidelines/default.htm</a>
5.	Desktop Management - Managing Electronic Documents and Directories	New South Wales	<a href="http://www.records.nsw.gov.au/recordkeeping/rib_30_desktop_800.asp">http://www.records.nsw.gov.au/recordkeeping/rib_30_desktop_800.asp</a>
6.	Metadata Information	Dublin Core Metadata Initiative	<a href="http://dublincore.org/">http://dublincore.org/</a>

## Appendix D   Interface Requirements

The purpose of this appendix is to provide general guidelines for collecting the appropriate information from contractors to ensure seamless integration of project data and promote efficient management of project documents. It is likely that contractors may also be Authors and/or Submitters of documents for storage. The Document Coordinator role may also be assigned to a contractor. All steps in this procedure are applicable to contractors. Therefore, copies of this procedure should be distributed to all contractors involved in the project. Additionally, contractors should also be notified of any updates and/or changes including Folders and Subfolders, Document Management Checklist, Document Eligibility Criteria and Document Repository Metadata.

Contractual documents should be handled as described in *PMP-10 Procurement Management Procedure*.



## Appendix E File Storage Details

This appendix provides a sample file structure that may be implemented for this procedure and information about repository security.

A folder structure (shown below) is an organizational construct originally developed for the world of paper document management. However, the logical organizing elements can be easily applied to the electronic world to facilitate browsing by end users. A basic folder structure has been developed for OETI that maps to the key projects and functions performed by the office.

- File Structure
  - Project 1
    - Project Management Documents
      - CPIC
      - OMB/Congressional Responses
      - OCFO EVM/Operational Analysis Reports
      - Audit Documentation
      - Staffing/Budget/Cost Reports
      - Procedures
      - Other Project Management Documents
    - EPA Documentation
      - Decision Papers
      - Security
      - IMS Schedule & Baselines/Reports
      - EPA Earned Value & Status Reports
      - Steering Committee Briefs & Minutes
      - Memorandums
      - Presentations
      - External Communications (OMB, GAO, Hill, etc)
      - Communications Internal to EPA
      - Administrative Information
      - Other EPA Documents
    - Contract Information
      - Proposals Associated with Contract
      - Internal EPA Documentation Supporting Contracts
      - SOW/SOO/Acquisition Information
      - Contract (Master)
      - Task Order
      - Contract Security Documentation
      - Other Contract Information Documents
    - Contractor Provided Documents
      - Project Plans
      - Contractor Earned Value & Status Reports
      - SOW – Specific Deliverables
      - Acceptance Memos
      - Meeting Minutes (Accepted)
      - Other Contractor Provided Documents

**Figure E-1. Document Management Sample Folder Structure**

All folders in the document management structure should have restricted access. The Document Coordinator, in consultation with the Project Manager, will be responsible for defining and requesting the access levels. Some example access levels could be read or delete.

Someone with Read privileges can only browse and read documents in the repository. Someone with Delete privileges can browse, read, edit and delete documents in the repository. Delete privileges are generally given only to the Document Coordinator and/or a systems administrator.

The levels of security and how they are implemented are specific to the individual document management tool used and all security should be coordinated through the administrator for the tool if not the project's Document Coordinator.

## Appendix F Document Submission Form

This appendix discusses the construct of the Document Submission Form, use of folders and subfolders, provides information on document metadata and offers a sample Document Submission Form, which Submitters complete and submit along with the document to be stored. The Document Submission Form is in Excel and is provided as an attachment to this procedure.

**Section 1** of the form includes metadata fields that should be completed with each document. The metadata in the sample form may be adapted to meet the needs of each project. The metadata provides additional means of identifying files and facilitating a search across the repository. The primary means of locating documents in the repository, however, is to browse the folder structure and review file names. When OETI moves to the Agency's ECMS, these metadata fields can be considered for inclusion in the ECMS metadata schema. Once the Document Coordinator determines the document's eligibility and uploads the file in the repository, he/she completes the *Electronic Document Name* field and the *Upload Date* field on the form and returns the completed form to the Submitter.

**Section 2** of the form is used to group the documents into the following categories:

- A. Project Management Documents
- B. EPA Documentation
- C. Contract Information
- D. Contractor Provided Documents

Proceeding sequentially from top to bottom of *Section 2* of the *Document Submission Form*, the first category/folder describing the document must be selected. The first category/folder that is applicable represents the "*Primary Folder*". At a minimum, all documents must be associated with a "*Primary Folder*". Continuing sequentially from the "*Primary Folder*", secondary and third folders should be identified, if applicable. Secondary and third folders are used for cross referencing and should be identified whenever pertinent. To ensure consistency in defining the primary/secondary/third folders, folders should be assigned in the order that they appear on the form.

This form uses the sample structure provided in Appendix E. If the document to be filed is a project artifact associated with an individual project, then the Submitter identifies the project name in Section 1 and checks the appropriate Primary and Secondary/Third file folders in Section 2A. If the document is not associated with a particular Project but applies to several projects, the Submitter checks the appropriate Primary and Secondary/Third file folders in Sections 2B, 2C or 2D.

The folder structure shown in the sample form in Exhibit E-1 is described below.

- Section 2: Categorizing each Document:
  - The **Project Management Documents (2A)** category includes documents that have applicability across projects. This sample includes CPICs, procedures, budget/cost reports, OMB/Congressional responses, audit documentation, personnel documents and OCFO EVM/operational analysis reports.
  - The **EPA Documentation (2B)** category assumes that all documents within these areas have been authored by EPA staff. The information within these folders should support EPA or other Government Agency mandated initiatives, decision memos, memorandums, presentations, briefs and minutes, earned value and status reports, schedules and OETI administrative information. EPA documentation also includes emails or other documents

as communicated by external parties, EPA management, or individual project management that identify decisions, new policies, new initiatives or other relevant supporting documentation not classified elsewhere. This area should have a security layer applied, which prevents unauthorized contractors from reviewing the documentation.

- The **Contract Information (2C)** category should include all areas of information that pertains to a contract including the master contract, internal EPA documentation supporting contracts, associated proposals, security documentation, the resulting statement of work, and the task orders. In the electronic system, this area should have a security layer applied, which prevents unauthorized individuals from reviewing the documentation.
- The **Contractor Provided Documents (2D)** category should include all deliverables required by the contract for delivery including the acceptance memos, SOW-specific deliverables, earned value and status reports, meeting minutes and other specific document deliverable assignments such as project plans. The document management activities for contractual documents should follow the *PMP-10 Procurement Management Procedure*.

## Document Submission Form

DOCUMENT SUBMISSION FORM				
<i>Instructions: Please complete appropriate sections of the form and submit it along with your document to the Document Coordinator.</i>				
<b>SECTION 1: DOCUMENT DETAILS</b>				
Project Name:	n/a	Document Title	OETI-PMP-07 Requirements Management Procedure	
Version Type & Number:	Final V1.0	Document Date (YYYYMMDD):	2007Jan10	
Contract NUMBER (if applicable)	BPA 03 OCFOIFMS-01	Submission Date (YYYYMMDD):	2007Jan10	
Contract NAME (if applicable):		Document Author:	Booz Allen Hamilton	
Task Order Number (if applicable):	5	Document Submitter:	Jacob Simmons	
Project Site Code:		Work Breakdown Structure (WBS):		
Sensitive Document (Y/N):	N	System Life Cycle (Y/N):	N	Signed Original (Y/N): N
Description (brief):	OETI-PMP-07 Requirements Management Procedure and Acceptance Final (version 1.0)			
Electronic Document Name <i>(Completed by Document Coordinator):</i>				
Upload Date: (YYYYMMDD) <i>(Completed by Document Coordinator):</i>				
<b>SECTION 2: FOLDER/SUBFOLDER SELECTION</b>				
<i>(Select at least one Primary Folder and any additional choices that apply)</i>				
CATEGORY		PRIMARY Folder	SECONDARY Folder	THIRD Folder
A. Project Management Documents	CPIC			
	OMB/Congressional Responses			
	OCFO EVM/Operational Analysis Reports			
	Audit Documentation			
	Staffing/Budget/Cost Reports			
	Procedures	X		
	Other Project Management Documents			
B. EPA Documentation	Decision Papers			
	Security			
	IMS Schedule & Baselines/Reports			
	EPA Earned Value & Status Reports			
	Steering Committee Briefs & Minutes			
	Memorandums			
	Presentations			
	External Communications (OMB, GAO, Hill, etc)			
	Communications Internal to EPA			
	Administrative Information			
	Other EPA Documents			
C. Contract Information	Proposals Associated with Contract			
	Internal EPA Documentation Supporting Contracts			
	SOW/SOO/Acquisition Information			
	Contract (Master)			
	Task Order			
	Contract Security Documentation			
	Other Contract Information Documents			
D. Contract Provided Documents	Project Plans			
	Contractor Earned Value & Status Reports			
	SOW – Specific Deliverables		X	
	Acceptance Memos			X
	Meeting Minutes (Accepted)			
	Other Contractor Provided Documents			